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Special:

# Circular Letter

TO: STATE AGENCIES, AGRICULTURAL DISTRICTS, PUBLIC AGENCIES,  
STATE COLLEGES AND UNIVERSITIES, COUNTY SUPERINTENDENTS  
OF SCHOOLS, AND INDIVIDUAL SCHOOL DISTRICTS

SUBJECT: INFORMATIONAL TIPS FOR TRANSMITTAL OF CONFIDENTIAL DATA

The California Public Employees' Retirement System (CalPERS) appreciates your continued assistance in achieving sustained success regarding information security, and providing essential protection for our members. This is critical to CalPERS' on-going efforts to ensure the availability, integrity and confidentiality of the information received.

Due to the growing number of identity theft cases, it is prudent to review your methods for transmitting confidential data. This Circular Letter contains **Informational Tips** to assist you in protecting the transmission of confidential data, and will help to ensure that information is used for its intended business purpose. Confidential data includes, but is not limited to, social security numbers, birth dates, and pay rates.

The most common transmission methods include:

## United States Mail

In most cases, provides an appropriate level of security protection for confidential data.

- Clearly identify the name and address of the intended recipient
- Include the name and return address of the sender
- Add a confidentiality statement to documents containing confidential data. Example:  
"CONFIDENTIAL EMPLOYEE DATA. UNAUTHORIZED USE OR DISCLOSURE IS STRICTLY PROHIBITED"
- Ensure that confidential data cannot be read through the envelope or envelope window
- Utilize a secure mail depository

## Facsimile (faxes)

With precautions, may provide an appropriate level of security protection for confidential data.

California Public Employees' Retirement System  
Lincoln Plaza - 400 P Street - Sacramento, CA 95814

Fax cover sheets should clearly identify:

- Name of intended recipient
- Total number of pages

#### Facsimile (faxes) -- continued

- Name of sender
- Telephone number of sender
- Confidentiality statement (see example below)

*"This facsimile is intended only for the addressee shown above. It may contain information that is privileged, confidential, or otherwise protected from disclosure. Any review, dissemination, or use of this transmission or its contents by persons other than the addressee is strictly prohibited. If you have received this transmission in error, please notify the sender immediately and follow their instructions regarding the disposition of this facsimile."*

#### Telephone and Voice Mail

With precautions, may provide an appropriate level of security for limited amounts of confidential data.

- Confirm the full name and telephone number of the recipient
- Ensure the identity of the recipient before providing any confidential information
- Provide your full name and telephone number

#### Electronic Mail

Does not provide appropriate security protection for confidential data.

- Not recommended for use when transmitting confidential data

Please remember to consider the CalPERS' Automated Communications Exchange System (ACES) for your agency's data transmission needs. ACES brings the power of the internet to your desktop, and provides a secure environment for your CalPERS' health and retirement program business transactions. Additional information regarding ACES can be found on the CalPERS' web site at [www.calpers.ca.gov](http://www.calpers.ca.gov).

We value your assistance in ensuring CalPERS' continuing efforts to provide quality service to our members, employers and stakeholders. Please share this information with interested parties at your agency.



Kenneth W. Marzion, Chief  
Actuarial and Employer Services Division